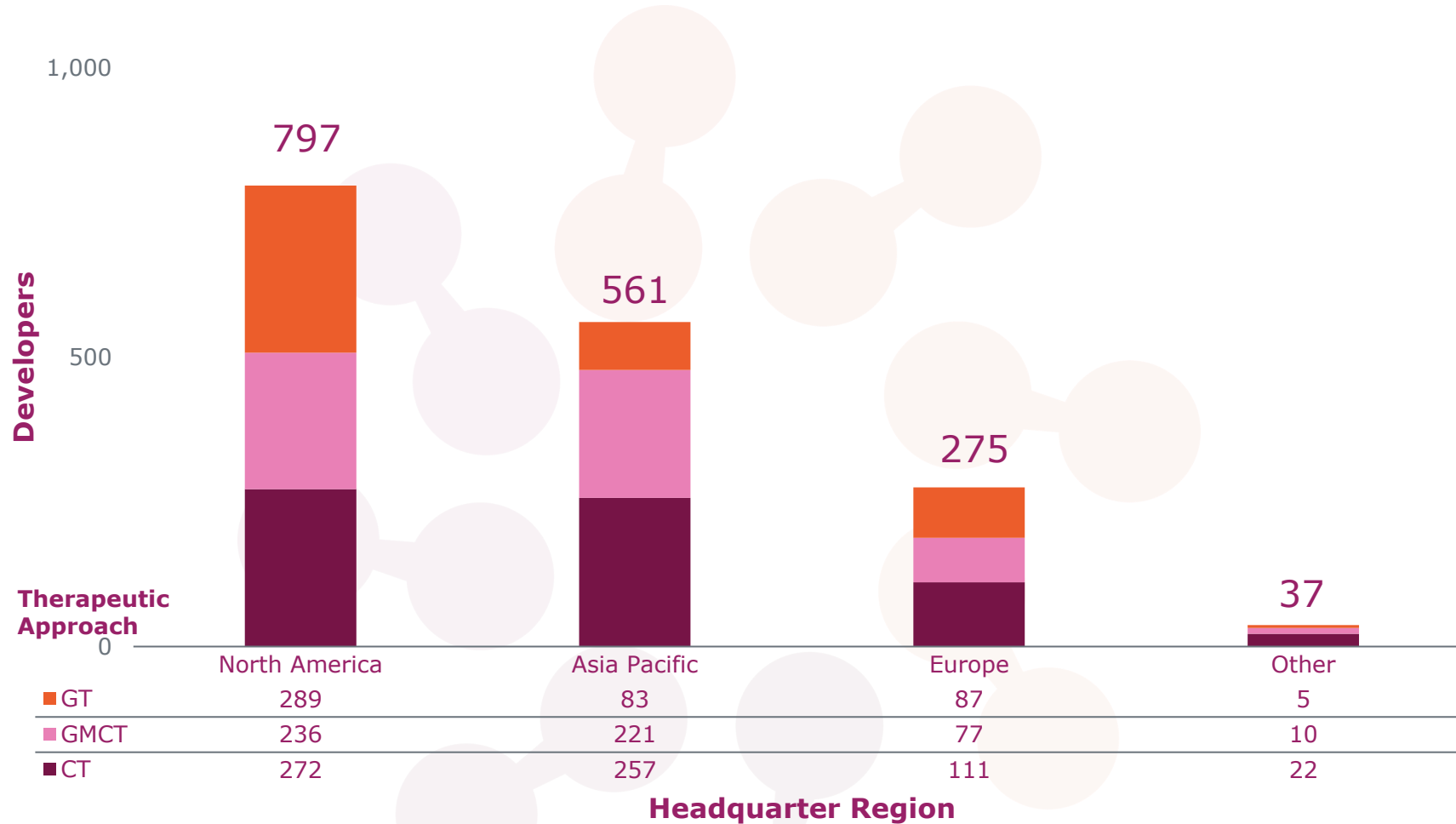
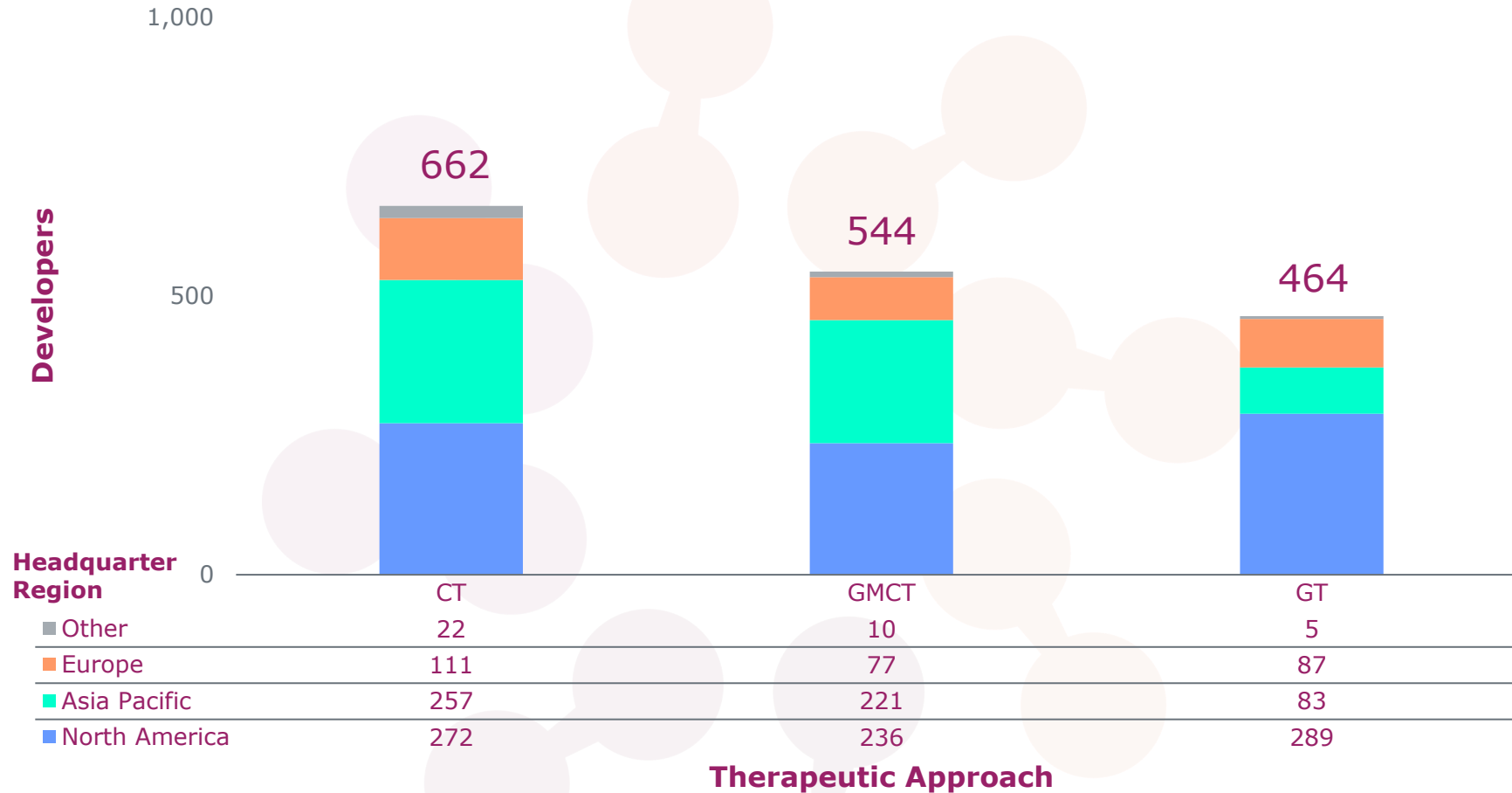


Developers by Headquarter Region and Therapeutic Approach



1. Within-graph labels represent headquarter region totals
2. Please see "Methodology Notes" for additional details

Developers by Therapeutic Approach and Headquarter Region



1. Within-graph labels represent therapeutic approach totals
2. Please see "Methodology Notes" for additional details

Methodology Notes for Developer Data

Methodology Notes

1. Developer data represent a snapshot in time; this snapshot was taken in December 2022.
2. Developer headquarter regions are based on the location of the parent headquarters of a company, whenever known, at the highest definition of 'Parent Company' available.
3. Therapeutic approach leverages GlobalData definitions (Cell Therapy, Gene-Modified Cell Therapy, and Gene Therapy) which may include non-durable treatments typically excluded by ARM (vaccines and antisense drugs).
4. Due to the use of GlobalData definitions of therapeutic approach, tissue engineering is not available as a therapeutic approach.
5. Therapeutic developers may have multiple therapeutic approaches in their pipeline and/or portfolio; the sum of therapeutic approach totals may not be equivalent to developer totals.